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ABSTRACT

Companies commit 2 to 5 billion dollars annually to employee tuition assistance plans, and an estimated 17 to 24 million employees are eligible for some form of tuition assistance. Despite these figures and despite widespread interest in the tuition-aid idea, a low 3 to 5 percent of eligible employees currently take advantage of the educational benefit. This manual is designed as a guide for those interested in developing or improving tuition-aid plans. The guide first defines and describes prevalent forms of tuition-aid plans as well as their benefits and payoffs. Key features of effective plans are then outlined, and concerns of different parties are addressed in questions and answers. Next, the plan-implementation process is explored and ways to overcome barriers to plan use are presented. Fianlly, a sample tuition-aid plan is provided, as well as resources for further investigation of the area. The guide is based on the findings of a study of tuition-assistance programs in the private and public sectors over the past four years. Key aspects of that examination have been (1) a major survey of negotiated tuition-aid programs in the private sector which involved detailed analysis of 79 tuition assistance plans, and interview and paper surveys of 50 company officials, union officials, and 100 workers; (2) on-site case studies of three highly used tuition-assistance programs; and (3) the operation during 1979 and 1980 of three workplace-based model tuition-assistance demonstration projects. (KC)

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Making Tuition Aid Work For You: An Action Guide for Managers, Labor Officials, Workers and Educators

Anne Rogers
Jane Shore

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FOREWORD

This action guide is one in a series of reports issued by the Project on Worker Education and Training Policies of The National Institute for Work and Learning. Funding support for this project is provided by the National Institute of Education, U. S. Department of Education under contract number 400-76-0125.

Making Tuition Aid Work for You ... is based upon four years of research on the structure and operation of tuition assistance programs in the private and public sectors. This guide may be used separately or in combination with Worker Education: New Energy for the 1980s' a slide tape program released in 1980 by the National Institute for Work and Learning.

The authors of this action guide were encouraged to synthesize learnings from the four years of NIWL research and to cast the results in more active and general language. The authors were encouraged to use their best independent professional judgements in synthesizing and translating project learnings.

The opinions and points of view presented in this action guide do not necessarily represent the official positions or policy of either the National Institute or of the Board of Trustees of the National Institute for Work and Learning.

Gregory B. Smith
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I. INTRODUCTION

> Salted by a new employer and union interest in "tuition aid" and worker education programs, there is prospect for a melting away of remaining barriers to bringing real educational opportunity to the adult period of life. Worker education, including tuition assistance as part of its curriculum, could be as important a development in the 1980's as the community colleges were in the 1960's -- or even as the land grant colleges were a century ago.
>
> Willard Wirtz in Tuition-Aid Revisited: Tapping the Untapped Resource

Tuition-aid has vast potential as a human resource development tool in the 1980's. For companies, unions, workers, and educators alike, this method of financing education and training opportunities offers great promise.

Corporate financial commitments to tuition-aid are impressive. Companies commit two to five billion dollars annually to employee tuition assistance plans, and an estimated 17 to 24 million employees are eligible for some form of tuition assistance.

Despite these figures and despite widespread interest in the tuition-aid idea, a surprisingly low three to five percent of eligible employees currently take advantage of the educational benefit. The National Institute for Work and Learning (NIWL) has found that significant barriers are faced by many workers who would otherwise be inclined to use tuition assistance monies to pursue further education. Yet NIWL has also discovered what seem to be the essential elements of successful tuition assistance programs, those which prevent or overcome barriers and lead to greater worker utilization of plans.

This manual is designed as a guide for those interested in developing or improving tuition-aid plans. While no two environments or organizations are exactly alike, there are some general guidelines which can serve as valuable tools for developing effective plans. It is hoped that this guide will provide helpful suggestions for interested parties -- corporations, unions, workers, and educators.

The guide first defines and describes prevalent forms of tuition-aid plans as well as their benefits and payoffs. Key features of effective plans are then outlined, and concerns of different parties are addressed in questions and answers. Next, the plan implementation process is explored and ways to overcome barriers to plan use are presented. Finally, a sample tuition-aid plan is provided, as well as resources for further investigation of the area.

Although there are sections in this guide which specifically refer to unions, there are many workplaces without unions. In these instances, the term "union" should be viewed generically as encompassing any employee association or group.

This guide is based on the findings of a careful study of tuition assistance programs in the private and public sectors over the past four years. Key aspects of that examination have been: (1) a major survey of negotiated tuition-aid programs in the private sector which involved detailed analysis of 79 tuition assistance plans, and interview and paper surveys of 50 company officials, union officials, and approximately 100 workers. . .(2) detailed on-site case studies

of three highly utilized tuition assistance plans (Kimberly Clark Corporation's Educational Opportunities Plan, the Education Fund of District Council 37 of the American Federation of State, County and Municipal Employees, and Polaroid Corporation's Tuition Assistance Plan) and, (3) the operation during 1979 and 1980 of three workplace-based model tuition assistance demonstration projects (in Pomona, California; Cleveland, Ohio; and Hartford, Connecticut). Each of these activities combined with numerous discussions with tuition assistance program administrators and with other company and union officials and workers support the ideas and recommendations for action proferred below.

II. WHAT IS A TUITION-AID PLAN?

A tuition-aid plan is any formal arrangement through which a company offers assistance to its employees for educational pursuits. A plan may be designed and administered by the employer as part of a regular benefits package or negotiated by the union through collective bargaining. Some plans cover only training directly related to a worker's current job; others expand eligibility to high school equivalency courses (GED), advanced degree programs, cultural courses, and even education for families.

Money, time, instructors, support services -- these are the "aids" that make education accessible to working adults. A study conducted by the NIWL in 1976 and 1977 identified four major categories of tuition assistance, none mutually exclusive. These are (1) tuition reimbursement or advancement plans; (2) educational leave and leave of absence plans; (3) scholarships and educational loans, and (4) training fund plans. Definitions of each are offered in the glossary. We will be primarily concerned in this guide with the most common types of tuition assistance strategies, namely tuition reimbursement and tuition advance plans.

Tuition reimbursement plans, the most common variety, pay all or part of the tuition and related costs of enrollment in education programs not provided by the company. Frequently covered costs are mandatory fees for registration, laboratory work, student activities and graduation in addition to the expenses of books and supplies. Under reimbursement plans some percentage of such costs are reimbursed to the employee by the employer after "satisfactory" completion of a course or program of study.

Tuition advance plans differ only in that allowable expenses are paid either to the employee or directly to the education deliverer prior to course enrollment. At present, tuition advance plans are far less common than reimbursement plans, but their popularity with companies, unions and workers appears to be growing rapidly.

Most tuition-aid plans establish criteria of eligibility for participation. Criteria may include (1) minimum length of service, (2) job classification, or (3) seniority.

Most plans also establish criteria regarding payment of educational expenses. Satisfactory completion of course work, often expressed in terms of a course grade, is a common criterion. Evidence of satisfactory completion of a course of study is required to secure reimbursement from the employer, or for waiver of the repayment provisions in most tuition advance plans.

No two plans are structured and administered alike. But the tuition-aid plan, in whatever configuration it takes, represents a commitment to the idea that employee education is a positive experience for all parties involved.

III. BUT WHO NEEDS TUITION-AID. . .WHAT ARE ITS PAYOFFS?

Tuition-aid bridges the gap between the employee and the education or training which may mean greater job security, better salary, career advancement, or personal enrichment. Improved morale and performance on the job are important returns. Many employees report that their options are broader under tuition-aid programs than other forms of company provided education and training, given the job specific and frequently company specific nature of much internally offered education and training.

For each dollar spend on tuition aid, the company may reap dividends as productivity and employee skills levels rise. Tuition-aid plans combat outdated knowledge, increase job satisfaction, aid in recruitment efforts, benefit the company's employee and community relations, and reduce turnover. Beyond these are some comparative considerations. Company officials familiar with tuition aid plans frequently emphasize the comparative advantages of tuition assistance programs over other forms of company provided education and training. Among these are the fact that employees participate in education and training on their own time usually and thus, production schedules are not affected. No employee salary or wage expenses are incurred as is normal with internally provided programs. Further, less direct and overhead expenses are incurred in the form of training, staff salaries and office space and equipment. This is not to contend that one form of education and training is necessarily better. It is only to note that tuition aid does have certain potential advantages.

What's good for the union member tends to be good for the union, to intensify commitment to and participation in the union. Unions view tuition-aid as a means of improving the position of workers in terms of their skills, personal growth, and future occupational lives. To raise the union's level of educational attainment and to increase worker effectiveness as union members and leaders are other significant goals.

The college, university, or other educational provider faced with a decline in traditional student enrollments can choose to seek out new markets and new students. Among these new markets are industry and business requiring highly skilled employees in management, scientific and technical areas. A worker seeking education represents not just a new revenue source but a new student eager and dedicated to making the most of a hard-won opportunity. Moreover, once adults take a course that meets their standards of interest and quality, they tend to return for more.

Employee education benefits society by helping break down the barriers between education and work and equipping citizens to be more productive and to actively participate in democratic decision-making processes.

IV. ELEMENTS OF A SOUND TUITION-AID PLAN

This section is written for those people responsible for developing or managing a tuition-aid plan. What is it about a good tuition-aid plan that makes it work? Are there certain things a plan must have in order for it to succeed?

What we can say is that those plans that work incorporate at least some of the features outlined here. Thus, while every plan need not incorporate all the elements below, each of these elements has contributed substantially to the smooth working of a number of plans.

CONTEXT AND ADMINISTRATION

- Leadership Support for Tuition-Aid

Tuition-aid plans can best flourish in a work environment in which education is believed in and supported. Institutional endorsement of the tuition-aid idea, beginning with top-level leadership, lends a legitimacy and validity to the notion of employer-supported external education which will be felt by employees at all levels.

- Institutional Support

Aside from top-level commitment to tuition-aid, participants will also benefit significantly from the support they receive throughout all levels of the institution. Because of the close and continuous contact they have with employees, first-line supervisors have a key role to play in promoting a belief in the value of utilizing tuition assistance benefits. Witness the fact that in a 1977 National Manpower Institute survey of barriers to worker use of education, a major barrier identified by workers was

insufficient encouragement from management. Supervisors should be thoroughly familiar with all aspects of the tuition-aid plan, its use and potential. Forming an ongoing, internal information network between supervisors, plan administrators, and employees would help greatly toward this end. When supervisors are well-informed about tuition-aid and discuss it frequently with employees and support them in their educational goals, the result can be, as one employee put it, "Education is just in the air at my company."

- Administrative Arrangement

Though organizations vary in the amount of resources or staff they are able to commit to a tuition assistance program, some form of built-in staff function for both the development and promotion of the benefit seems almost essential for the program to work well. That is, simply offering the benefit on paper is not enough to activate the often "latent" employee interest in utilizing tuition assistance. Whether a special tuition-aid administration office is set up or regular personnel and human resource development staff coordinate the program under their auspices, some form of "active attention" is key. Promotion is a vital aspect of institutional support. (The major components of such a promotional effort are discussed in this section under FEATURES AND PROVISIONS.) Again, supervisors should be fully engaged in this endeavor, coordinating their efforts with those of the tuition-aid or human resources staff.

- Accountability and Employee Involvement

Just as the institution should be involved in development

and support for the tuition aid process, so too should employees. Ongoing employee involvement will create a sense of ownership of the program or of entitlement, which often means increased usage. An organization could enhance worker involvement in the program by including employees on initial planning committees. Once the program is developed, supervisors and the tuition-aid or human resources office can solicit employee ideas and suggestions. Regardless of process, the key notion is that employees know that their opinions as "consumers" are taken into account in the design and administration of the tuition-aid plan.

- Integration into Overall Employee Development Program

Tuition-aid is an even more effective tool for human resource development when linked to the overall employee education and training structure. A company clearly committed to the career development and advancement of its workers provides them with direct evidence of the value of education and training. Tuition-aid for external education can be used as an effective supplement to the opportunities offered in-house. Further, when education is an obvious "presence" within an organization, workers become more familiar with it and the fears they have about re-entering the classroom as adults may well be reduced. This has been the experience of one plan sponsor studied, where fully half of the domestic workforce engages in some form of education each year (either external or internal) and 10 percent of eligible employees use tuition-aid. Management at this company is committed to promoting employees from within, and education is seen as a business necessity rather than as an expendable fringe benefit.

A wide variety of internal educational and career services are offered. Many employees use tuition-aid to obtain a degree, which is clearly key to advancement within the company. They also use the benefit to finance company-initiated training programs which are administered by outside educational institutions.

- Linkages with Educational Institutions

Area educators have a potentially important role to play in enhancing the success of a tuition assistance program. Again, collaboration is key. There are a number of ways that educational institutions can become sensitive to the learning needs of adult workers. The company, after assessing the needs of its employees, should let educators know what these are, in terms of subject matter, course delivery, and possibly even financing method. Education institutions can assist the company or union with such an inventory of employee and firm needs. This kind of collaboration has sometimes led to the introduction of new courses which workers have requested, classes on-site, courses at convenient times to mesh with work shifts, or a system whereby the company pays the school directly rather than reimbursing or advancing funds to the employee-student. These innovations are powerful tools, addressing some of the most important barriers workers face in returning to the classroom.

- Education Leave and Flexitime

A less common but very effective way to enhance employees' utilization of the educational benefit is to adjust work schedules to allow more flexibility in course attendance and study time.

Some companies provide for release time for educational leave (often paid) to enable employees to attend special programs or seminars. Another means is flexitime, which permits workers to adjust their starting and stopping times daily in order to schedule course work more easily. Many organizations have used flexitime with great success. (For more information on this practice refer to the bibliography of reference materials.)

FEATURES AND PROVISIONS

- Broad Eligibility

Nearly all successful plans have liberal eligibility provisions. A plan may incur some resentment on the part of employee groups if it is perceived as available only to certain select groups. In each of the successful educational assistance programs studied by NIWL, coverage is not limited to salaried or professional employees; rather, it is fully extended to hourly employees as well. In one plan, half-time employees receive prorated educational benefits. Broad eligibility provisions may lead to greater utilization of education by those workers traditionally considered least likely to return to school (i.e., hourly, blue or pink collar employees).

- Simplified, Flexibile Application and Approval Procedures

An adult who is tentatively contemplating the use of a tuition-aid plan may turn away in fear when faced with complex, rigid enrollment procedures and/or an imposing mass of forms. Programs that have successfully addressed this disdain for "red tape" have met with good results. One plan sponsor has consciously simplified forms and admissions procedures and kept them flexible so that

a student can enroll and be admitted into a program on the same day. The lack of bureaucracy and complicated, time-consuming registration procedures is reported by students to be extremely important. Another large tuition assistance program is revising and simplifying its tuition reimbursement process as it has become evident that its complexity was acting as a major deterrent to use.

- Course Coverage

One of the more controversial areas of tuition-aid plan design relates to the range of reimbursable courses. Must courses be for credit and be job-related in order to be eligible for reimbursement? What constitutes "job-related"? While some companies require courses to be related to the current job, a growing number stipulate simply that the course should relate to a career within the organization. Kimberly-Clark is an interesting example in this regard. Before the introduction of its Educational Opportunities Plan in 1974, the corporation's tuition-aid plan limited reimbursement to job-related courses. The participation rate was approximately 1 percent. One of the notable features of the new plan was its coverage of non-job-related courses, including cultural and personal interest courses. Participation jumped to over 30 percent. Interestingly, however, 90 percent of plan users take job-related courses. Coverage of non-job-related courses apparently evokes significant employee interest in the plan and evidences the company's sincere commitment to employee development, thereby encouraging usage. Employers must set limits on courses and acceptable educational institutions based on their resources and on the objectives of their individual tuition-aid plans; nevertheless,

flexible criteria in these areas generally seem to make for greater employee willingness to use the plan and greater employee satisfaction with it.

- Financing Provisions

A major barrier to many adults returning to school is cost. Even when covered by a tuition-aid plan, many workers are unable to advance the money for school and wait for reimbursement. Also, a large number of plans only cover partial costs. Add to that the common requirement that employees show proof of "satisfactory" (meaning either passing or a particular grade level) course completion before getting the refund, and one has all too often a situation of prohibitive financial and or psychological impediments. The successful plans studied by NIWL all entail little or no out-of-pocket cost to the worker. Polaroid and Kimberly-Clark both provide for 100 percent pre-payment of tuition costs (and related educational expenses in the case of Kimberly-Clark). Both organizations cite this provision as a major reason for the success of their plans. Further, Kimberly-Clark eliminates the potentially serious "fear-of-failure" barrier, as well as showing its strong trust in its employees, by including no grade requirement or proof of course completion.

Even if an organization is unwilling or unable to advance tuition assistance monies, other alternatives exist. For example, the money could be loaned at a low interest rate or efforts could be made to get schools to allow payment on the installment plan. The issue of payment should be carefully considered as it appears, not surprisingly, to be one of the most important factors in

whether or not a tuition assistance program really works, especially for employees in lower paying occupations whose need for education may be greatest.

- Availability of Counseling

Aside from the structural barriers adult workers face in returning to school (time, money, access), there is a whole other realm of psychological and informational barriers to be addressed. In the NIWL survey of worker-identified barriers, over half the workers cited lack of counseling as a problem. Good career counseling and educational advisement are essential to any effort to help workers map out a career, select appropriate education and training, and anticipate pitfalls along the way. Too many adults have been disappointed when education did not translate automatically into career advancement. As workers and often as parents, adults need to know how to juggle schooling with other responsibilities. Many adults are embarrassed or fearful of re-entering the classroom, hesitant because of negative associations with early classroom experiences. Add to this the fundamental need identified by many worker-students as inadequately met -- information -- and the necessity of good counseling is evident.

How to address this need? Once again, there are a number of possibilities, and companies must assess their own resources and staffing possibilities as well as local community resources. But the importance of providing some form of information or advisement cannot be overemphasized. If the company itself is unable to do this, workers should be apprised of any local

education information centers or brokering services. Equally or perhaps more effective are services provided at the work-site or union hall. Delivery methods can range from full-time counseling staff (perhaps the same persons who administer the tuition aid program) who offer advisement services during and following the workday; to supervisors who informally act as advisors; to workers who act as part-time peer learning advisors during lunch breaks, after hours, or on release time. In one plan, both group and individual counseling is provided, with group counseling worked into the education program itself. In this way, not only is the "counseling stigma" avoided, but adults learn that the "going-back-go-school trauma" is both natural and shared. Along with peers, they learn about the positives and negatives involved in a return to the classroom. Then, in individual counseling, they can work out a plan to best fill their own educational needs. The importance of the counseling program to this plan is so clear that one official deems counseling the heart of their program.

- Plan Publicity and Promotion

In this case, last is certainly not least. For time and again, lack of information about educational assistance programs for which employees are eligible has been identified as a major barrier to the use of such programs. This magnitude of the information gap often surprises the sponsors of the program. And the importance of this problem is obvious: workers are surely not going to use a program they are unaware of. Thus, the point arises again which was made early in this section: simply

offering a benefit on paper is not enough; some sort of initiative to promote the program is essential. Experience has shown that there are a number of very effective ways to publicize tuition-aid plans; the key thing is that the word gets out so that workers are well-informed about the opportunities available to them.

All the successful education programs studied by NIWL make deliberate efforts to promote worker awareness; however, the most effective means to do so vary according to each environment. Some of the more popular and successful methods of information dissemination include company and union newspapers and newsletters; bulletins, brochures, and announcements; word-of-mouth and one-to-one contacts; and special meetings and orientations. It seems likely that several of these methods used in combination will work best, as different people respond differently to various media.

V. QUESTIONS AND ANSWERS ABOUT TUITION AID

A. From Companies

Q. Isn't tuition aid just an employee service without practical payoff for the company?

A. More than 80% of the company officials surveyed by the NIWL indicate that tuition-aid programs have (1) updated worker knowledge and skills to changing technology; (2) improved workers' job performance; (3) prepared employees for future assignments with the company; and (4) aided workers in their personal development and growth. Sponsors report that their plans result in a more highly skilled, intellectually alert workforce, and that such programs support their recruiting efforts, enhance employee morale, and reduce turnover. . .quite a practical payoff.

Q. Won't workers use their training to find a job with another company?

A. No doubt a worker newly trained through tuition-aid could choose to leave. Special problems occur in industries with severe skill shortages or wage differentials among companies. But several factors militate against massive numbers of departures. While some employee mobility is inevitable and probably beneficial to the company, tuition-aid is generally a means for

stabilizing and maintaining a corps of more skilled and dedicated workers. First, workers are likely to feel increased loyalty towards the company which has made an investment in them. Moreover, good learning experiences engender a taste for more; tuition-aid is a benefit which can be used again and again. An excellent tuition-aid plan is a magnet for good workers from elsewhere. And in cases where a workforce reduction or plant closing is necessary, a company can use tuition-aid as part of a relocation effort for its employees.

Q. Won't it be costly to implement and sustain a plan with the provisions described above?

A. The answer depends on whether the return justifies the outlay. A calculus that precisely measures returns doesn't yet exist, or in any event isn't in use. The costs are known; they are the sum of the tuition payment plus administrative salaries and overhead. The returns may properly include changes in employee performance, absenteeism, output, stability, and attitude as well as workplace climate. Where do we properly draw the line? How do we measure these qualities? In most cases, we have to rely on best professional judgment. And in the judgment of officials in companies and unions where highly used plans are operating, the returns on investment look good indeed.

Q. What sizes and types of companies offer tuition-aid plans? Isn't this just for Big Business?

A. Recent surveys indicate that tuition-aid plans have become increasingly prominent in the past 15 years in all sized firms By the mid-1970's, estimates are that about 95% of the largest employers (companies with over 10,000 employees) had such plans, and that fully 92% of companies in the 1000 to 10,000 employee range had tuition-aid plans In the 500 - 1,000 employee group an estimated 82% had them. Indeed, tuition-aid programs are the most widespread mode of employer-provided education and training. The companies using tuition-aid programs the most extensively for employee education and training purposes, however, are firms in the 500 to 1,000 employee range. Tuition-aid plans are found in all types of industries. Finance, insurance and real estate are among the fast growth industries for tuition assistance plans as are other segments of the service sector.

Q. Isn t it difficult for a small company to amass the resources (staff and funds) for tuition-aid?

A. As noted above, it is the mid-sized companies with 500 to 1,000 employees who rely most heavily on tuition-aid plans to meet their employee development needs. In firms under 100, the problems of

communicating information about the plan and educational opportunities can frequently be more easily overcome than in larger establishments, according to most organizational behavior analysts. So staff resources need not be as significant as in the larger venture. Further outlays for educational programs will be less than for a larger employer, all other factors held constant. At NIWL, with 40 employees, we have a participation rate of about 22% in our two year old program.

B. From Unions

Q. Will tuition-aid affect job security or seniority rights?

A. No. Use of tuition-aid by a worker will not affect another worker's job security, although it may advance the user's security by expanding skills. Tuition-aid use does not interfere with seniority clauses; that is to say where job bidding rests on seniority, a junior individual will not bypass another more senior worker by virtue of the fact that he or she participated in education or training with tuition-aid funds. However, tuition-aid may be used advantageously by the worker to ready himself or herself to assume the new position qualified for on the basis of seniority. Furthermore, tuition-aid financed study may help an employee qualify for a higher level position in those firms

which practice job-posting. The other connection between tuition-aid and seniority is that negotiated tuition-aid plans may stipulate increases in benefits corresponding to seniority.

Q. Have unions negotiated tuition assistance plans?

A. Yes, and with increasing frequency. We have estimated that in the mid-1980's there were approximately 200 negotiated tuition assistance plans in the United States covering nearly 2,000,000 unionized workers. These figures exclude employees who participate in plans provided unilaterally by the employer. The figures also exclude the many plans (and workers) under collectively bargained agreements that cover fewer than 1,000 workers. The manufacturing industry has the highest number of negotiated plans followed in order by transportation and utilities, services and construction.

Q. Is tuition-aid only for managers and union leaders or for all employees and union members?

A. Tuition-aid is a resource for any working adult who will seize the opportunity. Presently, the most frequent users of tuition-aid programs are managers, professional and technical workers. But, as never before, union stewards, officers and rank and file workers are going "back to school" at all levels.

Q. How much should the union be involved in the negotiation and administration of tuition-aid plans?

A. Clearly, this is one for each union to answer. However, many unions consider tuition-aid important because of the difference it can make in the future careers and lives of individual members.

Q. Does tuition-aid use lead to promotion?

A. If the tuition-aid plan covers appropriate courses, an individual may study to obtain the occupational skills needed to advance up the career ladder. Moreover, the energy and initiative exhibited by the worker-student is likely to impress management favorably. Nevertheless, few organizations with plans offer a guarantee of a direct or automatic link between tuition-aid use and promotion, for fear that it will create expectations that may not be satisfied.

Q. Where do workers attend classes?

A. Courses may be offered at the worksite, at union halls, or offices, or on college campuses. Union involvement in the tuition-aid plan design and administration can help ensure that courses are scheduled at locations and times convenient to the members.

Q. What types of courese and institutions are workers ususlly eligible for under tuition-aid plans?

A. Again, plans vary enormously in terms of courses covered and institutions approved. Some underwrite education in cultural and non-occupational areas; others are restricted to skills training and upgrading. It depends on the provisions negotiated into the plan.

C. From Educators

Q. Why should an educator care about tuition-aid and worker education?

A. Adults are returning to the classroom in record numbers; fully 35% of all college students in 1978 were 25 or older. Working adults represent a substantial population who are eager for education-- and thanks to tuition-aid--can afford it. At a time when traditional college student enrollments continue to decline, few colleges will choose to ignore opportunities to serve these "new" students. Tuition-aid can represent an importan source for financing adult post-secondary education.

D. From Workers

Q. How do I know if my company has a tuition-aid plan?

A. Many companies with tuition-aid publicize the plan in their employee orientation or personnel

handbook. Some organizations have special workshops, bulletins, or advertising in newsletters to further publicize tuition-aid benefits. Supervisors are often an excellent, accessible source of information regarding existing opportunities. Another route is to inquire of the Personnel or Human Resources Department.

Q. How do I apply for tuition-aid? How will I know if I'll be accepted?

A. Usually, application involves filling out a payment request form available from supervisors or department heads. These parties review and forward it with a recommendation to the tuition-aid coordinator, who checks course and institution eligibility. Unless there are any problems, the payment is made through the accounting department with the whole process taking about a month. If there are problems with approval, provisions are made for joint review of the decision and/or an appeal process.

Q. Do other workers use tuition-aid to return to school? Am I too old to become a student again?

A. Many workers have found that a return to the classroom is an excellent way of boosting job skills, developing a career, or simply enhancing personal growth. Whatever the motivation, tuition-aid may be the tool to make it possible. Further,

the notion is changing that school is simply for the young. Youth enrollments are down, and more and more classrooms include working adults who have the experience, know-how, and skills to make their education even more valuable.

Q. How will my supervisor feel about my using tuition-aid?

A. Of course this varies by individual. However, many supervisors actively support their employees' efforts to further their education through tuition-aid, realizing that an educated workforce is a skilled and effective one.

Q. Can I take time off during working hours for study under a tuition-aid plan?

A. Usually not, though in some cases plans provide for several hours of release time per week for education. While this is the exception rather than the rule, some also allow for more extended (paid or unpaid) educational leave.

Q. Will there by much out-of-pocket cost?

A. This depends on whether a tuition-aid plan (a) provides for advancement or reimbursement of tuition monies, and (b) upon the tuition and related educational costs at the institution offering the course of study. Most plans involve a reimbursement; thus employees must initially put out the funds for tuition and other educational expenses and then be reimbursed.

VI. HOW TO INITIATE TUITION AID

A. The Company Role

The decision to sponsor a plan suggests that management considers education a wise investment. To what degree this commitment is based on either a conception of employee or employer needs will vary. However, the programs with the highest participation rates typically are "framed and planned to put primary emphasis on the contribution to employee and human interests." (Willard Wirtz, Tuition Aid Revisited.) As the director of the training and development department in a company with a highly subscribed plan puts it,

> The belief is that the greatest sense of wholeness for employees makes better workers, and better workers will make a better company, and that this all comes out in the bottom line of higher profits.

A first step in initiating your tuition-aid plan is to engage those groups whose endorsement is critical to the plan's survival. Collaboration among management, the union (where employee representation exists), and employees themselves is essential to reach mutually agreeable provisions.

Whether lodged within a corporate or union administrative structure, responsibility for the plan's initiation and design or revision could be delegated to a carefully selected working group. For example, one plan calls for the appointment of a special team which reports directly to the president or other chief executive, responsible for designing the plan. Depending on the company's structure, the team could include the directors of human resources, education and training,

personnel, public affairs, or other departments; shop stewards, education or apprenticeship directors, or other key union staff; college directors of extension or continuing education; and individual workers representing, as appropriate, hourly, clerical, technical and professional workers and management.

Regular meetings and adequate staff time must be provided for from the very beginning. The appointment of one or two staff full time is ideal. The team can furnish the nucleus for the permanent staff eventually necessary to administer the tuition-aid plan. Among the team's first acts could well be a careful look at the workforce which the plan will serve. Just who are the company's employees? What educational and salary levels have they achieved; what occupational skills do they possess and which are needed for career advancement? What learning do workers themselves want; what do they have to say about educational needs and life goals? What is the age profile? And other practical questions: how are work days scheduled; are there many parents who depend on child care; could transportation to the education site be a problem? Within the population of workers under scrutiny, no doubt several discrete groupings with common characteristics will emerge.

If the needs of each group are thoughtfully weighed, an appropriate and responsive tuition-aid plan is more likely to result. Because a plan proved brilliantly successful at a computer firm in Massachusetts, for instance, does not mean a point-by-point replication at a Tennessee high production plant

will be equally successful. Research, experience, and common sense all testify that while good plans have elements in common, like good suit of clothes, each is tailored to the wearer.

A third area for exploration during the planning phase is the education infrastructure of the local area. Where are the colleges? What coursework is offered, at what price, time, location, and carrying what credentials? Are there other appropriate educational resources, such as vocational or technical schools, community centers, museums or libraries? Preliminary discussion with representatives of these institutions may indicate their sensitivity to the special requirements of working adults. If the most receptive institutions are at a considerable distance from the worksite, the team may want to ensure that the plan incorporates provision for onsite classes or compensates for transportation.

Once the team is in operation and has assessed the workers' education needs, existing tuition-aid plans, and area educational resources, it is time to put a proposed plan structure down on paper. A plan need not incorporate all the features discussed in these pages to work well, but each of these features has contributed substantially to the success of one or more of the highly subscribed plans studied by the Institute.

B. The Union Role

With increasing frequency, labor unions are taking leadership roles in tuition-aid programs, demonstrating that their contribution to the design and administration of a program can

be considerable. Often these roles derive from the union's strength as an advocate and interpreter of workers' needs, problems, and aspirations.

For example, unions are especially well-suited to structure and provide educational advisement services, an absolutely critical element of any tuition-aid program. The NIWL model for education advisement is currently being tested at three demonstration sites under the auspices of the Communications Workers of America, the International Union of Operating Engineers, and two state employee unions (the Connecticut State Employees Association and the Connecticut Employees Union Independent). This model calls for the selection and training of several union members to be Education Information Advisors. These "EIA's" help their co-workers locate education resources, apply for tuition-aid, and work through barriers to further education. The International Ladies Garment Workers Union (ILGWU) is in the planning stages of a "learning organizer" advisement system, a similar model. Among the advantages of union-based education advisement are the convenience of counseling offered at a worksite or union hall and the commonality of experience often shared by a peer advisor and the would-be worker-student.

Another role for which unions are uniquely prepared is to channel information about tuition-aid to members. (Lack of information is a second major barrier to participation in education identified by workers). Many unions are using their established communication lines to promote and publicize tuition aid. Union newsletters, local meetings, bulletin board postings, special announcements and orientations, and one-to-one contacts

are among the methods of getting the word out. Preliminary evidence from the NIWL demonstration project sites indicates that awareness of tuition-aid seems to increase when the union takes an active role in promoting the program.

Yet another area for union leadership is in communication with colleges and universities and other education providers. In order to become familiar with these institutions, it is important to collect catalogues, class schedules, and anecdotal information. Arrange to meet with the director of extension or continuing education or other appropriate education officials. Such meetings should give you a sense as to how flexible the administration, structure, and curricula are in terms of your membership's education interests. Educators increasingly welcome suggestions about how to make their institution more responsive to working students.

Further discussion may lead to cooperative efforts to revise curricula, admission requirements, registration procedures, class scheduling or location. Cooperation has paid off in New York City, where several major unions have worked out degree and certificate programs offering a labor studies concentration with area colleges. The United Auto Workers (UAW), which negotiated a $1000 per year educational benefit for workers with the three major American automobile manufacturers, serves as an "employee advocate" with educational institutions. For example, Wayne State University and the UAW collaborated on a revision of the course payment system, whereby the university is paid at the conclusion rather than the beginning of a course. Auto workers are no longer required to pay the tuition fee and carry that cost

over the months before their reimbursement is processed. But the university is still ensured of its payment. Other commonly cited barriers to workers' use of tuition-aid may be equally susceptible to remedy through collaboration between unions, employers, and educators.

Lastly, a union is obviously in a position to work with management in negotiating or improving a tuition-aid plan. It is important to be sufficiently conversant with the many varieties of tuition-aid to propose alternatives. If the company is unable to finance a 100% prepayment plan, for example, perhaps an education savings account or loan system, or partial pre-payment, partial reimbursement arrangement would be workable.

As outlined above, a union can contribute substantially to the successful functioning of a plan: as a source of education advisement, an information conduit, a broker with educational institutions, to name a few ways. Demonstrating the union's willingness and ability to accept a share of the responsibility for making tuition-aid work, by taking on one or another of these roles, may encourage management to initiate or expand a plan.

C. The Educator's Role

In many communities, educators have taken initiatives which have contributed to making tuition-aid programs work. A survey by the American Association of Community and Junior Colleges (Community and Junior College Journal, April, 1977) revealed that 41 percent of the responding institutions had developed educational programs at the request of employers.

Four out of ten were involved in apprenticeship training programs and 65 percent had union members on their advisory committees. Labor studies programs are offered at many four-year institutions. While all these collaborative efforts are not directly related to tuition aid, they do indicate the extent to which educators are reaching out to the workplace with positive results.

The primary task is to learn about local business and industry and establish good ties with its management and labor representatives. The educator is not in a position to dictate the shape or substance of a tuition aid plan to a company or union. What is appropriate is to match the educational institution's resources with those of the business or industry and indicate how the financing (or leave) mechanism of tuition aid can cause the match to be more satisfactory all around, e.g., how the education institution can meet established needs of employers, unions and workers for education and training so as to enable the more rational assignment of company and union education and training resources.

How to gain a firm knowledge base on local business and industry will vary according to the community and traditional ties between it and the education institutions. A very basic approach is to review materials available in your own placement office or at the public library or Chamber of Commerce. Larger corporations and industries publish annual reports, newsletters, and public relations materials. Draw on the local press, colleagues, friends, and of course your personal knowledge of the community. Consult with appropriate officials and secure the

necessary endorsements within the college: the president, alumni affairs officer, extension study director, community relations director, or others. If there is any history of involvement between the institution and an employer or union, it would make sense to build on it. Has a cooperative education venture ever been proposed or attempted? What happened and why? Are alumni prominent in the company?

What to search for is a sense of the company's organizational structure; the nature of the product or service offered; priorities for future growth; training or education arrangements; positions advertised; and any problems, setbacks, or internal frictions. Much of this information will only come to light through conversations with management or union officials. Depending on the organization's structure, appropriate management contacts include directors of education and training, human resource development, personnel or planning, or even the president if this is a small company. Union leaders include the local president, education director, or shop steward.

During discussion with management, it may help to mention institutional strengths that appear to correspond to the company's training needs. Working together, employers and educational institutions can select areas where cooperation looks feasible. Some employers may perceive education in its broadest sense to be valuable; others are proponents only to the extent training produces specific job skills. One approach to forging a connection between an education institution and a company is to identify a training need, computer programming

for example, and to conduct a well-publicized and promoted trial run. A small-scale success may encourage all parties to proceed.

Examples abound which demonstrate that a tuition aid plan can be an excellent catalyst for collaborative efforts between colleges or universities and the workplace. It is worth the educator's time to encourage the adoption of tuition aid, because a plan can provide employees the money, time, or support services many will need to avail themselves of educational opportunities planned by the educator and employer. Without a well-structured plan, evidence is that employee participation in education tends to be low. Educators may choose to draw the employer's attention to the testimony of business and industry executives who are pleased sponsors of tuition aid or arrange a meeting with such an executive. Among corporate sponsors of tuition aid are those who believe tuition aid is a good recruitment tool and that workers highly trained and satisfied with their work are more productive. If an educator is familiar with tuition aid options he or she can suggest alternatives for consideration; if tuition advance is not feasible, a loan system might be. Any endeavor that the educational institution can share, or take on entirely, to contribute to a successful plan should be discussed. Some examples: instituting mail-in registration, revising payment procedures, rescheduling or relocating classes, setting up skills or study brush-up courses. The more willing the institution, the more likely the business or industry is to seek its assistance,

even to the point of delegating advisor or observer status during the planning or revision of a tuition aid program.

As noted earlier, cooperative efforts between educational institutions, employers, and labor unions are occurring with greater frequency throughout the United States. An important lesson from this record of experience is that the assumption that workers are interested only in job-related education is mistaken. While job security and career advancement are cited as being of central importance so are concerns such as completing a degree, preparing for retirement, being a well-rounded person or a better citizen. So in talking to union leaders or speaking to a union meeting about education, maintain two-way communication. Although one purpose is to acquaint the membership with the education institution, another is to get their feedback. Why haven't workers taken courses at the college? Is it money, time, red tape, lack of information, lack of interest? What subjects would they like to study? Their answers will indicate how the institution could be more responsive and what barriers to participation in education are perceived.

Sustained communication with the union and its leaders is fundamental to a good working relationship. Ways to promote this include attending meetings, submitting articles to the union newsletter, posting announcements in the union hall, and mailing out course catalogues and schedules. If a tuition aid plan exists, the educator can work with the union to publicize it and streamline procedures that hamper employee use of its benefits.

APPENDIX A

A CHECKLIST OF PROBLEMS AND SOLUTIONS

The list of solutions offered here is by no means comprehensive; it is intended simply to illustrate the variety and simplicity of potential methods for eradicating common barriers to adult learning.

Problems	Solutions
Age	Older workers may accept the prejudice that says people over 30 are too slow or set in their ways to study or learn. Or they may feel intimidated by the prospect of studying in classes where younger students could stereotype or deride them. Counseling or discussion sessions to talk out shared apprehensions have helped adults collectively overcome them. Scheduling classes at times and places conducive to adults learning together avoids the threat of competition with younger students. Or classes can be structured to draw on youth's interest in learning from people who have experience in the "real world" of work. This can reinforce the self-confidence of adults while building rapport between different age groups
Low Self-Concept	Many adults have a poor image of themselves, generated by harmful experiences in school, a

Problems	Solutions
Low Self-Concept	sense of being "old" or "stupid", their own or others' definition of themselves as "just a" housewife, mechanic, secretary and so forth. Counseling permits exploration of this habitual lack of confidence and planning to overcome it. Other support services or introductory classes -- peer tutoring, basic or study skills courses -- provide less threatening ways to test the education waters and to build confidence.
Time	People who work all week, many of whom have family ties as well, reasonably wonder how to reserve hours for education. Scheduling classes near the worksite or home saves time otherwise absorbed by travel. Adjustments of the work day or week -- flexitime, educational leave, and leave of absence -- allow each employee to reschedule the elements of her/his day as is conducive to optimum use of time for work, education, and the rest of living.
Cost	The cost of tuition, fees, books, child care, and incidentals may look prohibitive to many adult workers. However, employers can underwrite a percentage of these costs through various financing mechanisms: tuition reimbursement or

Problems	Solutions
Cost	advances, scholarships, training funds, education savings accounts or loans. Even when 100% payment is impossible, employers' contributions have encouraged employees to make up the difference, to act.
Red Tape	Red tape discourages prospective students who resent wasted time, are confused or intimidated, or take it to be a warning of what education is all about. The processes of course registration, admittance to school, or requesting tuition aid are frequently mired in paperwork. Colleges can institute mail-in registration; tuition aid administrators can simply require a minimum of forms, officials, and steps for payment processing.
Gaps in Education	Some adults are educationally handicapped by having missed out on training in basic areas: study skills, arithmetic, reading, and writing. Courses in basic skills and study techniques, GED programs, peer tutoring are all ways to fill these gaps, build confidence, and prepare a firm foundation for further education.
Language and Basic Literacy	Substantial numbers of Americans -- immigrants from Asia, the Carribean, Latin America, Europe -- encounter difficulties at the workplace and

Problems	Solutions
Language and Basic Literacy	in school because they lack proficiency in English. Classes teaching English as a second language are essential for these people. Significant numbers of adult native born Americans lack basic literacy and numerical skills. Tuition aid can help defray the cost of basic skills programs, if the employer cannot provide such courses internally. The payoff is immediate and significant.
Location	Class locations may deter prospective students if they are inconvenient to public transit, in high-crime areas, or require expensive and time-consuming car travel. Whenever possible, schedule classes convenient to employees' homes or jobs: worksites, union halls, community centers, public libraries, and schools.
Child Care	Parents are often prevented from returning to school because either there is no child care available or no way to pay for it. Some educational institutions offer free or low-cost child care for students; others televise or tape courses or sponsor them in convenient community or worksite locations. A few tuition aid programs will reimburse child care expenses. A local union, groups of working students, or the employer can arrange for child care services.

Problems	Solutions
Child Care	What is needed is awareness of this barrier and its special significance for working women.
Lack of Information	According to NIWL research, many employees have never heard of their tuition aid plan, let alone how it works. Ongoing publicity and promotion, through union and company channels, has virtually eliminated this barrier in some places. Counseling can help an employee relate this opportunity to his or her education needs.
Lack of Incentive	Many adults do not see that additional education has rewards. Any public recognition of education's contribution to career or personal growth can affirm more positive attitudes. Of course, job promotions and strong support from management and union leaders are very practical incentives. Credits, degrees, credentials, and letters from educational institutions are also symbols of accomplishment. If educational offerings are sensitive to adult needs and interests, this itself is an incentive.
Lack of Interesting or Pertinent Courses	This complaint often stems from the fact that workers are unaware of the diverse courses available. Better publicity directed to workers where they live and work has sometimes overcome

Problems	Solutions
	this problem. But in other cases, the available courses simply aren't of interest or pertinent to employee needs. Those responsible for the curricula can talk to workers to find out what subjects do interest them and test new courses to see if adults do enroll.
Lack of Counseling	In the NIWL survey of worker-identified barriers, over half of workers cited lack of counseling as a problem. Counseling can address the psychological barriers many adults face returning to the classroom. It can provide information about education and financial resources and career planning. Practical problems, an unsympathetic spouse or rusty study habits, can be explored. Both group and individual counseling sessions have their benefits.

APPENDIX B

ONE OF MANY POSSIBLE MODEL TUITION-AID PLANS

What follows is a model tuition assistance plan for a fictitious enterprise. The nomenclature and the generic provisions of most plans are presented. The plan incorporates in one of many possible ways most of the features discussed above. References to specific titles or functional positions are mainly for writing convenience. The reader will know who the appropriate management and union or employee representatives are by title.

Which raises two introductory points. First, this tuition-aid plan is presented as though the employer's workforce is unionized, though not necessarily as though the plan were negotiated. The majority of establishments in the U.S. are, of course, not unionized. In those cases we encourage the reader to think of the references to the union in terms of employee committees, employee representative groups or whatever alternative form of employee voice pertains in the specific employment context. Secondly, it should be restated for emphasis that this is not <u>the model plan</u> which should be implemented and negotiated across the land. This is one among many possible configurations, presented solely for the purpose of giving concrete representation to most of the ideas presented above for making tuition aid work for you.

TUITION ASSISTANCE PLAN

I. Statement of Policy

To encourage employees to plan and direct their career and personal development, the tuition assistance plan provides financial aid and/or paid leave for educational courses and programs in accordance with the following procedures.

II. Eligibility

All full-to-half time, salaried and hourly employees with six months or more of service with the company are eligible to participate in the tuition assistance plan. The amount of financial aid is pro-rated according to an employee's scheduled hours of work, i.e., 40 hours = full payment; 30 hours = 3/4 payment, etc.

III. Acceptable Courses and Programs

- Basic reading, writing, English language, and arithmetic courses;
- Courses or programs to maintain or improve skills required in the employee's current job; or next higher level job to which the employee aspires;
- Courses or programs relevant to or required for a skill, license, certification, or degree appropriate to the individual's career development and the company's need for the particular craft;
- Specific degree programs, including GED, Associate, Bachelors, and graduate degrees in all areas germane to the company's operation and continued growth;
- Test preparation classes for promotional examinations within the company;
- Cultural and personal interest activities.

IV. Acceptable Educational Institutions

Accredited postsecondary institutions, certified correspondence schools, and other institutions, organizations, or individuals approved by the company.

V. Financial Aid

The company will prepay 100% of the tuition costs (including registration and laboratory fees) of acceptable course(s) or program(s) up to a maximum of _____dollars ($_____) per eligible employee in any year. Course or degree-related expenses for books, drafting and laboratory supplies, certification and licensing fees, transportation and child care may be reimbursed from the $_____ allotment.

VI. Educational Leave

Employees receive regular wages and benefits when participating in any of the three following leave arrangements:

- Flexi-time: employees may rearrange their regular working hours to schedule a course or program;
- Short-term leave: employees may request up to 10 days leave per year to complete a specific educational activity during working hours;
- Extended leave: a limited number of paid leaves of up to one year's duration (minimum 2 weeks) are granted. The educational activity must serve the interests of both the company and employee.

VII. Plan Administration and Staffing

A. Tuition Assistance is administered by the Human Resources Development Department.

B. The Tuition Assistance Coordinator reports directly to the Director for Human Resources Development. The Coordinator:

- Is responsible for day-to-day administration of the program
- Updates program administrative procedures
- Monitors accounting department maintenance of tuition assistance accounts, bookkeeping, and payments
- Coordinates selection, trains, supervises and assists Education Information Advisors (EIA's)
- Explains and interprets program to managers and employees
- Promotes and publicizes program internally
- Develops and maintains resource library on educational opportunities outside the company
- Develops and maintains working relationships with area education institutions
- Coordinates external publicity for the program
- Acts as secretary/convener of the Education Planning Committee
- Screens requests for education institution approvals and appeals of tuition assistance denials
- Reports to each department/agency quarterly on employee participation

C. Education Information Advisors (EIA's) are employees nominated either by the union Education Director or the Director of Human Resources Development on the basis of their interest in education and good relations with both management and the union. Final selection of an EIA is determined by the Education Planning Committee with mutual consent of both management and union members. Up

four hours leave time per week with pay is granted each EIA to pursue her/his responsibilities:

- Inform and advise employees regarding tuition assistance, area educational resources, and overcoming common barriers to education, through both group and individual sessions.
- Refer employees to other information sources and professional career counselors or education brokers
- Report regularly to the Coordinator.

D. The Education Planning Committee consists of 4 members: the Tuition Assistance Coordinator, the Director of Training, Director of Human Resources Development, and the union Education Director. The Committee meets monthly to decide:

- Final approval of educational institutions
- Final determination of tuition assistance appeals
- Final approval of EIA selection
- Overall direction of external publicity
- Ongoing evaluation and planning for program's development

VIII. Procedure for Applying for Financial Assistance

A. The employee completes a payment request form available from department heads, EIA's, and the Coordinator.

B. The form is submitted to the employee's immediate supervisor who reviews and forwards it to the department head with a recommendation. The department head reviews, recommends, and forwards the request to the Coordinator.

C. If the request is approved at both levels, the Coordinator confirms course and institution eligibility and forwards the request to the accounting department which issues a check to the employee. Employees should anticipate that processing of the request will take up to four weeks.

D. If either manager or department head disapproves the request, or either course or institution are unacceptable, the Coordinator meets with the employee and management (if appropriate), to work out an alternative course of study. The Coordinator has final approval/denial authority unless the employee chooses to appeal a decision to the Education Planning Committee.

IX. Procedures for Applying for Leave

A. Flexi-time: the employee arranges with immediate supervisor a modified work schedule. If core hours are affected, department head approval is required.

B. Short-term leave: requests must be approved by supervisor and department head.

C. Extended leave: Requests must be initiated by the department head, reviewed and approved by Education Planning Committee.

APPENDIX C

GLOSSARY OF TERMS

Collective Bargaining Agreement -- an agreement reached through negotiations between a company and a union specifying wages, hours, and conditions of employment for certain employees at one or more locations.

Educational Leave -- leave granted to an employee for educational purposes for a specified period during working hours.

Educational Loan Plan -- a formal arrangement under which an employer lends money to qualified employees for education or training on a full- or part-time basis, and requires repayment of the loan according to an agreed-upon schedule.

Employer Contribution -- employer payment to a fund that is used to finance employee education and training. Employer payments may be based on a percentage of hourly, daily, or monthly payroll costs or on a fixed dollar amount per worker.

Leave of Absence -- leave granted an employee for educational purposes for an extended period of time.

Negotiated Tuition Aid Plan -- any formal program through which a company has agreed, within terms of a company-union contract, to pay all or part of the tuition and related financial expenses incurred by employees covered under the agreement while pursuing courses of study offered on or off company or union premises. Tuition aid plans usually do not include apprenticeship courses.

Scholarship Plan -- a formal arrangement under which an employer provides eligible employees with grants of money, all or partial, to cover costs of education or training programs on a full-time or part-time basis.

Seniority -- a privileged status attained by length of service with an employer.

Training Fund -- formal funding arrangement in which an employer contributes a fixed amount per employee to a central fund to finance education and training; some funds involve the establishment of a training institute. Training funds are usually administered by a board of trustees.

Trustees -- company and union representatives responsible for administering negotiated tuition-aid plans or training funds.

Tuition Advancement/Reimbursement Plans -- plans that pay all or part of tuition and related costs for enrollment in schools and colleges outside the firm. (See text, II. What is a Tuition-Aid Plan?)

Tuition-Aid -- any formal plan through which a company offers financial assistance to some or all of its employees to encourage them to complete courses of study at outside educational institutions. Tuition-aid plans are grouped into four types in this study, and each type is considered to have specific provisions such as an application and approval process. These

four types of plans are: tuition advancement/reimbursement plans; educational leave and leave of absence plans; training fund plans and scholarship and educational loan plans.

APPENDIX D

Other Resources
From The
WORKER EDUCATION AND TRAINING POLICIES PROJECT

Available August 1980

"WORKER EDUCATION: NEW ENERGY FOR THE 1980's" - A Slide Tape Program. This 15 minute program examines several successful tuition assistance programs administered by companies and unions and recommends ways to increase the effectiveness and use of tuition assistance plans. Views of company officials, union officials, educators and working men and women are offered. This slide-tape program is ideal for employee orientation programs and for union membership meetings. ($15.00 Weekly rental fee. Shipping and handling included).

The Policy Research Monograph Series

PRICE*	ORDER NO.	TITLE
$10.00	PRM 1	The Structure of Adult Learning. Education and Training Opportunity in the United States. Bryna Shore Fraser. 1980. 88 pages
$12.50	PRM 2	Training and Education by Industry. Harold Goldstein. 1980. 80 pages.
$12.00	PRM 3	Calling the Tune: Communications Technology for Working, Learning and Living. Ted Carpenter. 1980. 90 pages
$15.00	PRM 4	Issues in Education and Training for Working Women. Denise Wilder. 1980. 152 pages. (Released in collaboration with the National Commission on Working Women).
$10.00	PRM 5	Worklife Education and Training and the Ordeal of Change. Charles Stewart. 1980. 79 pages

PRICE*	ORDER NO.	TITLE
$10.00	PRM 6	Patterns of Adult Participation in Learning Activities. Ivan Charner. 1980. 82 pages.
$ 8.00	PRM 7	Education and Training for Middle-Aged and Older Workers: Policy Issues and Options. Julia French. 1980. 58 pages.
$ 8.00	PRM 8	Alternative Work Patterns: Implications for Worklife Education and Training. Jane Shore. 1980. 56 pages.
$ 5.00	PRM 9	Barriers to the Older Student: The Limits of Federal Financial Aid Benefits. Robert Sexton. 1980. 38 pages.

THE CASE STUDY SERIES ON EFFECTIVE TUITION AID PROGRAMS

PRICE	ORDER NO.	TITLE
$7.00	CS 1	The Education Fund of District Council 37. Jane Shore. 1979. 95 pages
$6.50	CS 2	Kimberly-Clark Corporation's Education Opportunity Plan. Leslie Rosow. 1979. 81 pages.
$5.50	CS 3	Polaroid Corporation's Tuition Assistance Plan. Kathleen Knox. 1979. 40 pages.
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Dr. Herbert Levine, Director of the Labor Education Center at Rutgers University has assisted NIWL on this project as Senior Study Consultant. The project has been advised and informed as well by a National Advisory Committee of representatives from companies, unions, and education institutions.

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